

Committed to providing comprehensive and cost efficient services, TPA, Inc. offers an array of design and administrative services for the following types of qualified retirement plans:

- Traditional 401(k) Plans
- Roth 401(k) Plans
- Comparability Plans
- Age-Weighted Plans
- Safe Harbor 401(k) Plans
- Profit Sharing Plans
- 403(b) Plans
- Defined Benefit/Cash Balance Plans

TPA has the depth of experience that translates to smooth and efficient handling of everything from plan design and installation to the processing of routine transactions. The following comprehensive installation services and documents, as applicable, are provided:

- Plan Design Meeting
- Prototype Document
- Individually Designed Document
- Summary Plan Description
- Adopting Resolution
- Form SS-4 to Establish a Trust Identification Number
- Sample Asset Transfer and Plan Administrator Service Termination Letters
- Population of Retirement Plan Software with:
 - Current Plan Design Specifications
 - Current and Historical Trust Data
 - Current and Historical Participant Data
- Loan Program

Following the installation process your plan is assigned to one of our highly competent plan administrators. Your assigned plan administrator is the primary point of contact coordinating and performing all services required, ranging from annual census collection to annual compliance. The following services, as applicable, are provided:

- Annual Employer and Employee Reports and Benefit Statements
- Allocation of Employer Profit Sharing Contributions
- Vesting Calculation
- Forfeiture Allocation
- Signature Ready Form 5500 and Related Schedules
- IRC Section 410(b) Coverage Test
- IRC Section 416 Top Heavy Test
- IRC Section 415(c) Maximum Annual Limitation Test
- IRC Section 401(k) ADP Test
- IRC Section 401(m) ACP Test
- IRC Section 401(a)(9) Required Minimum Distribution Calculations
- Participant Loan Set-Up and Annual Loan Maintenance
- Distribution Calculations (e.g., Retirement, Termination, Hardship)
- IRC Section 401(a)(4) Nondiscrimination in Amount of Contributions or Benefits Test

